

QUALITATIVE STUDY ON PRIORITY AUDIENCES FOR PUBLIC SERVICE MEDIA

December 2022



The study was commissioned by BCME and Tallinn University.
Design of research questions – Latvia + Estonia
Implementation and report of the survey - Norstat

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The topic of the research

- The role and importance of professional media and in particular public service media in the life of Russian- speaking population of Estonia

Study Objective

To understand

- how audiences shape the meaning and quality of media
- the role of media and journalism in the society
- as well as how media influence choices during the elections

Methodology

- Focus-group discussions (online Nov-Dec 2022)
- 2 hours per session

Methodology & Profiles



Demographics

- 15+ YO
- Living in Harju and Ida-Viru counties

Media usage

- All to be primarily Russian media consumers

Sample structure

- | | |
|------------------------------|---|
| 1. 15-34 YO / Harju | 7 |
| 2. 35-58 YO / Harju | 8 |
| 3. 15-34 YO / Ida-Viru | 7 |
| 4. 35-58 YO / Ida-Viru | 7 |
| 5. 59+ YO / Harju + Ida-Viru | 6 |

Profiles

1

GROUP 1 (YOUNGER-AGED, HARJUMAA), 29 November 2022

ID	Gender	Age	Profession	Region
TG1_F(30)	Female	30	Pharmacist	Harju county
TG1_F(29)	Female	29	Project Manager	Harju county
TG1_M(33)	Male	33	Technician	Harju county
TG1_F(33)	Female	33	Technical Assistant	Harju county
TG1_F(31)	Female	31	Deputy General Director	Harju county
TG1_F(26)	Female	26	Student	Harju county
TG1_M(26)	Male	26	Teacher	Harju county

2

GROUP 2 (MIDDLE-AGED, HARJUMAA), 30 November 2022

TG2_M(39)	Male	39	Driver	Harju county
TG2_M(40)	Male	40	Social worker	Harju county
TG2_M(38)	Male	38	Head of Shift	Harju county
TG2_F(47)	Female	47	Verification Researcher	Harju county
TG2_F(38)	Female	38	Housewife	Harju county
TG2_M(51)	Male	51	Computer Designer	Harju county
TG2_F(40)	Female	40	Pharmacist	Harju county
TG2_F(53)	Female	53	Quality Specialist	Harju county

3

GROUP 3 (YOUNGER-AGED, IDA-VIRUMAA), 1 December 2022

ID	Gender	Age	Profession	Region
TG3_F(24)	Female	24	Automation Engineer	Ida-Viru county
TG3_M(29)	Male	29	Information Technologist	Ida-Viru county
TG3_M(34)	Male	34	IT-Specialist	Ida-Viru county
TG3_M(30)	Male	30	Transporter	Ida-Viru county
TG3_F(34)	Female	34	Teacher	Ida-Viru county
TG3_F(26)	Female	26	Administrator	Ida-Viru county
TG3_F(30)	Female	30	Sales Specialist	Ida-Viru county

4

GROUP 4 (MIDDLE-AGED, IDA-VIRUMAA), 6 December 2022

TG4_F(40)	Female	40	Customer Service Representative	Ida-Viru county
TG4_F(57)	Female	57	Accountant	Ida-Viru county
TG4_M(40)	Male	40	Sales Manager	Ida-Viru county
TG4_M(52)	Male	52	Security Guard	Ida-Viru county
TG4_M(40)	Male	40	Entrepreneur	Ida-Viru county
TG4_M(58)	Male	58	Specialist	Ida-Viru county
TG4_M(50)	Male	50	Electrician	Ida-Viru county

5

GROUP 5 (OLDER-AGED, HARJUMAA + IDA-VIRUMAA), 7 December 2022

TG5_1F(61)	Female	61	Trainer	Ida-Viru county
TG5_F(63)	Female	63	Retired	Harju county
TG5_2F(61)	Female	61	Administrator	Ida-Viru county
TG5_1M(61)	Male	61	Retired	Ida-Viru county
TG5_M(63)	Male	63	Retired	Harju county
TG5_2M(61)	Male	61	Retired	Harju county

Information & media content in general

1

Being informed means...

- keeping up with the times
- being aware of the latest news
- feeling alive
- experiencing the fullness of life

TG2_M(51): "Being informed gives you the feeling that you are alive."

TG5_F(63): "It gives the feeling of the fullness of life."

2

The purpose of media content consumption is...

- to stay up-to-date
- to self-educate
- to get entertained
- to enjoy, relax
- a form of leisure activity

TG1_F(26): "I use plenty of content for entertainment and for my personal development, e.g., programming lessons, English language courses. Media are not only about the situation in the world, politics."

3

The importance of media content consumption lies in...

- being able to predict changes
- being able to plan life
- being able to make informed choices or opinions
- being able to analyze, make informed conclusions and decisions
- the joy, pleasure, satisfaction it gives

TG1_F(31): "The consumption of media content is important in order to understand what is happening, in order to predict what will happen."

4

Hot topics in media

- Politics
 - Ukrainian-Russian conflict
 - Sanctions against Russia, all Russian
- Energy crisis

What is missing?

Culture, entertainment, useful tips and practical advice for everyday life, mind-opening topics (travelling, active leisure opportunities etc.)

TG4_M(50): "When everything is only about politics out there, everything else is relegated to the background. This is bad, because it's all about politics, politics, politics and that's it. /.../ I think it is wrong to shout only about politics, war, sanctions. As if there were no other life."

For many, being informed means keeping up with the times, being aware of the latest news, as well as feeling alive and experiencing the fullness of life.

In addition to being up-to-date, media content consumption allows people to self-educate, enjoy, and relax, get entertained.

Study results show that for the participants it is important to consume media content to be able to predict changes, plan life, make informed choices, decisions, and conclusions.



“

*TG1_M(26): My wife had savings in a Russian bank, and I actively followed information in the media in order to understand what was going on. The probability of war was actively discussed there, and on February 22, when we realized that something was definitely about to happen, we withdrew all the money. **The news saved our money.** I don't know what would have happened to it if I hadn't watched the news.*

”

Main sources of information

The internet is a key source for information in all the groups despite the age, gender and region.

Alike Younger groups, some Middle-aged and Older groups' participants **still use TV, including online-TV** where they can watch Russian TV channels (RTR, Rossija-1 etc.) banned from Estonian airwaves.

Social media, friends, relatives and colleagues are other popular sources of information.

Awareness assessment

- I feel informed because I actively follow information and am aware of the latest news
- I feel informed because I follow different sources to see the big picture

TG2_F(38): "I am always aware of the latest news."

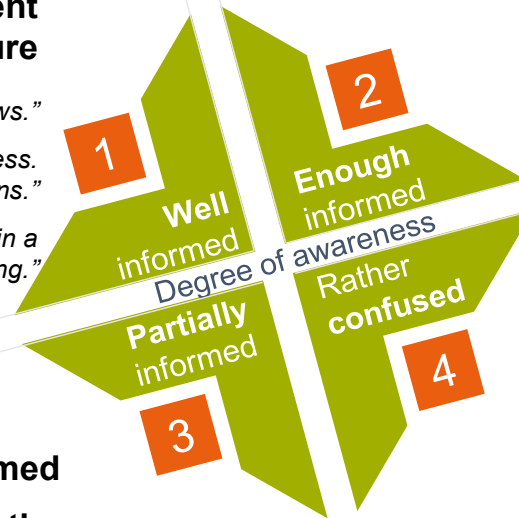
TG5_1M(61): "I read local press, Russian and Ukrainian press. Then I am able to analyze information and make conclusions."

TG5_F(63): "You can't live in a closed shell. We live in a city, in a country, in Europe, in the world. You need to know everything."

- I feel partially informed
- I am only aware of what's on the agenda in the media

TG4_M(40): "If you take Estonia, Russia, Ukraine, news about them is constantly being played – we know a lot, we see a lot. If you take America or Australia, we don't know much. Now it's all about politics."

TG4_M(50): "... it's all about politics, politics, politics and that's it."



- I feel informed in the areas of my interest
- I am informed enough – I know what I need to know

TG3_F(26): "I think that I am informed in the areas that interest me."

TG1_F(33): "For me what I know is enough."

TG3_M(34): "I believe that to the extent that I need it, I am informed. If I need something, I try to find information, google it."

- I rather feel confused than informed because I don't know what is fake and what is true
- There is plenty of information and I don't know what to believe

TG1_F(31): "I believe that I know and hear a lot, but how much of all this is true, I do not know."

TG2_F(53): "Of course, now there is a lot of information, but I rather consider myself a confused person than an informed one."

TG4_M(50): "Nowadays there is plenty of information from all sides, and different information comes from different sides. I feel sick of it."

Impact on information seeking

Firstly, **increased activity** in consumption of information (Covid, the war in Ukraine and parliamentary elections),

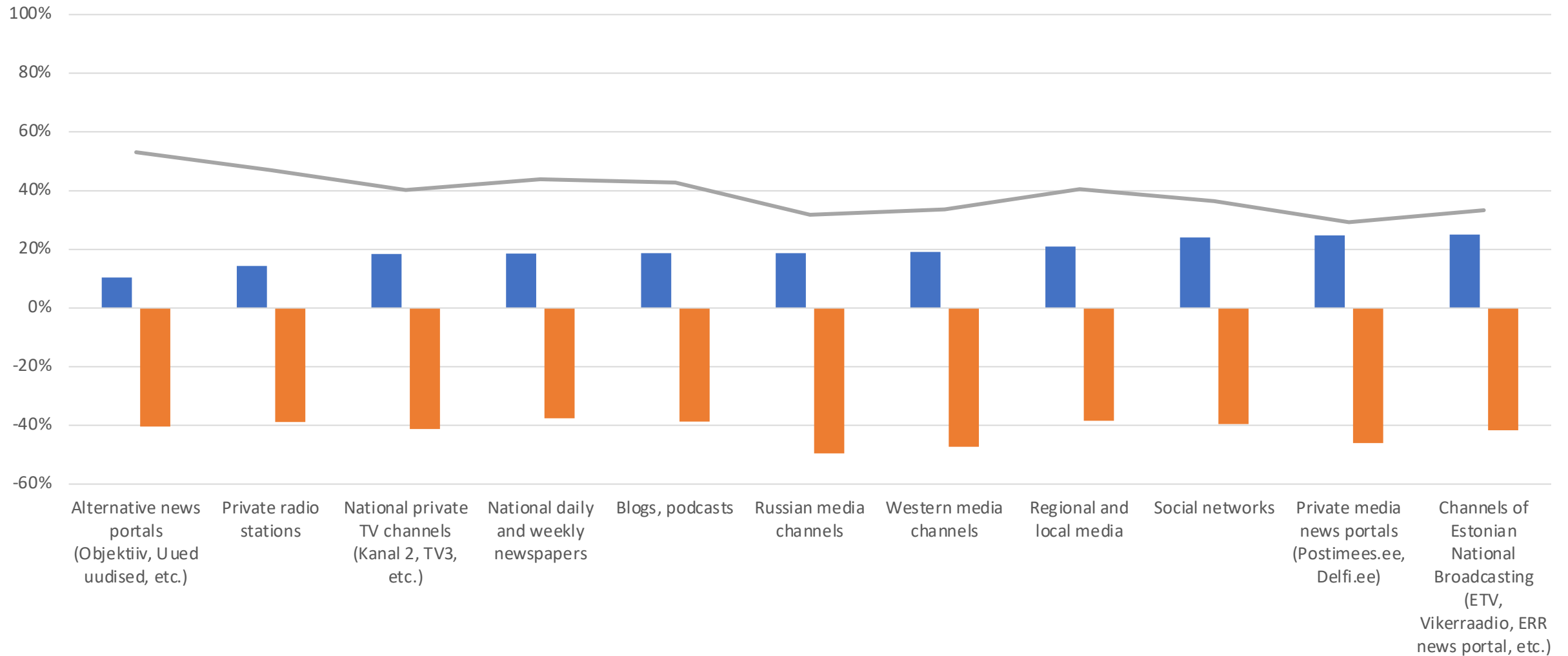
and then – **news fatigue** and, as a result, **partial or complete refusal from media consumption.**

Some young people said they have not yet recovered from the coronavirus crisis, when the events in Ukraine have started and their psyche simply does not allow them to be as involved in these events.

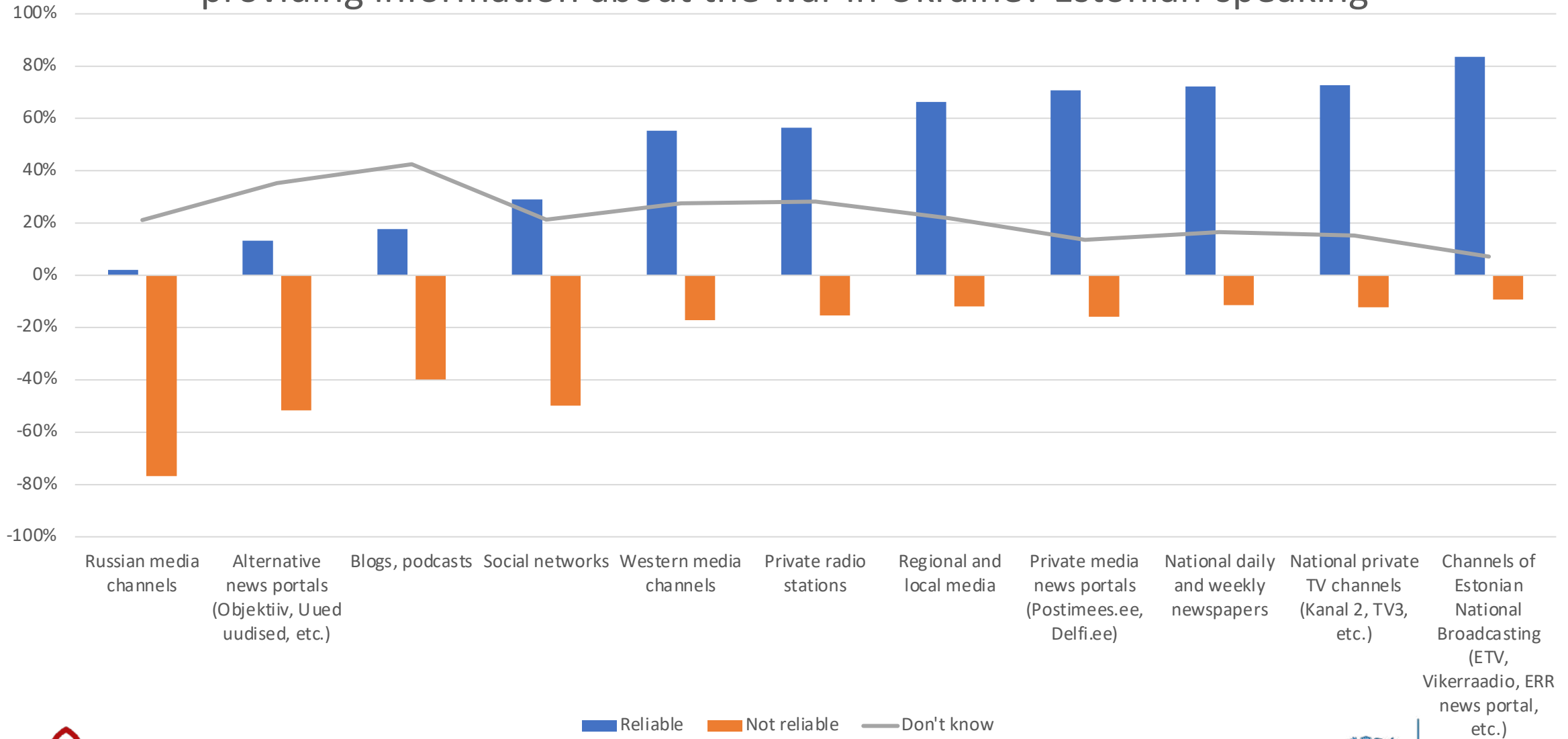
Key factors driving news fatigue are media-saturated environment causing inability to follow and adjust to continuous big changes and leading to the mood disorders – depression, despair, and apathy, annoyance, and rejection.

Those who only consume content they find interesting, comprehensive and useful as well as the ones who have a clear intention to avoid content they find uninteresting, said this decision is **the only way to save nerves and maintain better mental health.**

Please assess how reliable you consider the following media to be in providing information about the war in Ukraine? Russian-speakers



Please assess how reliable you consider the following media to be in providing information about the war in Ukraine? Estonian-speaking



News fatigue

In the huge flows of information, often contradictory, some get confused, while their inability to find out the truth leads to the feeling of powerlessness and helplessness.

As a result, people stop believing the news at all and try to avoid it.

They become suspicious and start questioning all the information they receive.

Lack of trust: Russian-speaking audience is somewhat suspicious and the root of it lies in the fact that Russian audience and Estonian audience sometimes receive different information.

Another **important factor driving news fatigue and avoidance among Russian-speaking population of Estonia is the anti-Russian sentiment:** *in addition to being oppressed through persecution of their native language, closure of Russian schools, deprivation of civil rights, they are offended with the fact that Russia as the neighbouring country is always treated as an enemy in media.*

News fatigue drivers

1 Media-saturated environment

Fast-paced and saturated media environment is **tiring** for some and **inability to follow and adjust to continuous big changes leads to the mood disorders** – depression, despair, and apathy. The **inability to stop, control or influence** what's going on causes **annoyance and rejection**. **News fatigue goes hand-in-hand with the inability to absorb information** when one thinks rest is needed. **Negative, aggressive, toxic** information prevails as it collects more clicks than something positive, and it **causes anxiety**.

TG3_F(34): "I don't get tired of the news, but of the things that happen in the world. If I don't watch the news, I don't understand how to build my life and the life of my family."

TG1_F(31): "I'm just tired – there is politics, energy crisis and inflation. And this is from day to day. Before that, there was covid, vaccines, certificates. I just want some variety of topics. And then you read and understand that you don't understand anything, and you can't influence anything, and you feel hopelessness and despair."

Mood disorders, annoyance, rejection

Disregard, indifference, abstraction

news fatigue & avoidance

Powerlessness, helplessness

TG2_M(51): "The confusion comes from the fact that now there is a lot of information, often contradictory."

TG2_F(53): "There is a lot of information, the head is loaded, but now you don't believe anything."

TG4_M(52): "I was born here. Estonian is great, but we don't need it here. When a topic about Estonian starts, I automatically switch off, I do something else at that moment."

Repetition 2

Audience **hearing the same information over and over starts to tune out or switches to different activities**. Repetition of facts might be perceived as more truthful by some, but when audience **does not agree to what is being said, it causes irritation, and, as a result, the willingness to escape, hide from the media, take a break, spend more time with friends and family**.

TG2_M(38): "There is not much going on in Estonia, so all topics are discussed a hundred times."

3 Contradiction

In addition to the fast-paced and saturated media environment, there are **huge flows of information, often contradictory**. There is **plenty of conflicting information** and the evidence from different sources which cannot be reconcile. This **causes confusion and the inability to find out the truth leads to the feeling of powerlessness and helplessness**. As a result, **people stop believing the news at all and try to avoid news. They become suspicious and start questioning all the information they receive**.

Anti-Russian sentiment 4

Infringement of the Russian-speaking population in media drives news fatigue among Russian-speaking population of Estonia. In addition to **being oppressed through persecution of their native language, transition of Russian schools to Estonian, deprivation of civil rights, Russia as the neighbouring country is always treated as an enemy in media** and it all causes irritation and news fatigue.

TG1_M(26): "Taxpayers' money goes to Sergei Metlev, who writes questionable articles. Why should we give him money when he pulls us to one side? It upsets me, it offends me."

The functions and roles of journalism and media

The attributes of professional media

Dispassionate, neutral, fact-based narration, lack of spite, media pluralism, big resources, experienced team, and ability to admit mistakes.

In the Middle-aged and Older groups a popular opinion was that there is no professional media in Estonia at all.

Some stated it is important for the media outlet to be professional as only professional media have resources, connections and sources needed to produce high quality content.

Others, on the opposite, admitted professional media are usually dependent on the government, political party, or sponsors, while **unprofessional media are more independent and are more eager to tell the truth**. They are deeply convinced **good quality media can be unprofessional**.

Is public service media professional?

RATHER YES

YOUNGER GROUP:

- **Considering the volume of financing, public service media is professional enough** (to some reason, some participants think that public service media are underfunded)
- **They do their best, their maximum** with the resources they have

TG3_M(34): "They may not be up to the mark somewhere, but given the amount of funding, the quality is more or less decent."

RATHER NO

- Too **amateur** yet
- Too many **failures** to be called professional

TG3_F(34): "I would say no. There is such a thing as a code of journalistic ethics and some of the programs that were on ERR contradicted this code. For example, in Estonia we have the concept of the presumption of innocence. There was a case when the life of one person was turned inside out. His guilt was not proven, but the whole situation was shown in detail. There is only one such person in our city, and the whole city recognized him."

TG3_F(24): "No, because on the same ETV+ there are programs that seem amateur. Yes, maybe they have good operators and good processing, but it is obvious that the quality of the shooting itself is not very good, the frame is not set very well, there are background noises. This shouldn't happen in a professional setting."

NOT NECESSARILY
(may be and may be not)

- Professional media are not necessarily public media as well as public media are not necessarily professional

TG4_M(58): "Professional media is not necessarily public service media. If the content is presented competently, intelligibly, it is professional. Not necessarily public service media correspond to it. There are certain requirements when building a website; you either meet them or not. There is the topographic of the web, the same in the multimedia environment: if the requirements are met, it is professional."

Public service media. Critics.

Public state media is too amateur yet and there are too many failures to call it professional. Some participants think public service media are swimming like cheese in butter – being financed from the state budget, they do not care about the quality of the content.

PSM are of a lower quality, too slow when it comes to urgent matters, work not hard enough for the good of society and are one-sided: talk about the government only in a positive way, talk only about the advantages of the decisions made. There is no constructive criticism, or another point of view displayed, no negative aspects of the decisions made.

The interests of the Russian-speaking part of the population of Estonia are underrepresented or are represented superficially. (participants from the Middle- aged and Older groups).

Public service media. Critics.

Foreign policy dominates the media content, while some social issues are covered only "for show" or to distract from more important problems.

The Middle-aged group from Tallinn expressed the opinion that touching on high-profile topics, such as the transition of the education system to Estonian or the war in Ukraine, is just a way to **distract people from more important problems, such as the energy crisis and highest ever inflation.**

Public service media in Estonia is good at...

Supporting cultural life of Estonia, covering local events, opportunities for leisure activities

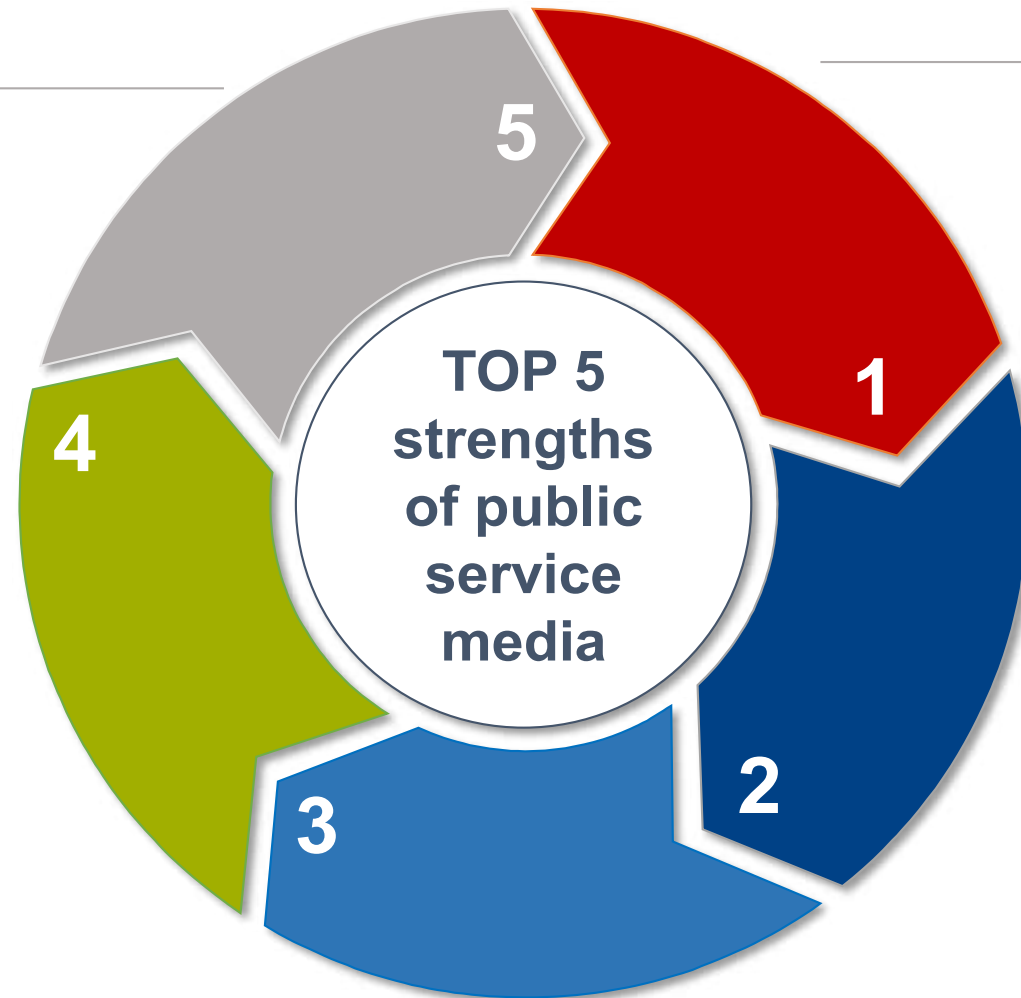
TG3_F(34): "They are good at covering local city events."
TG2_M(51): "...for example, the skating rink has opened, its opening hours, location."
TG2_M(51): "They inform about specific events in the field of culture /.../. This is what they do well, and this is what they should do."

Covering everyday questions – how to get allowances, benefits, subsidiaries for electricity etc.

TG2_M(38): "They are good at covering everyday information, such as how to get benefits or how electricity will be subsidized."

Representing different points of view (in some questions, not related to politics)

TG3_M(34): "ERR is good at representing different points of view. Sometimes it seems not enough, but it is clear that they are trying to show different points of view and for me this is important."



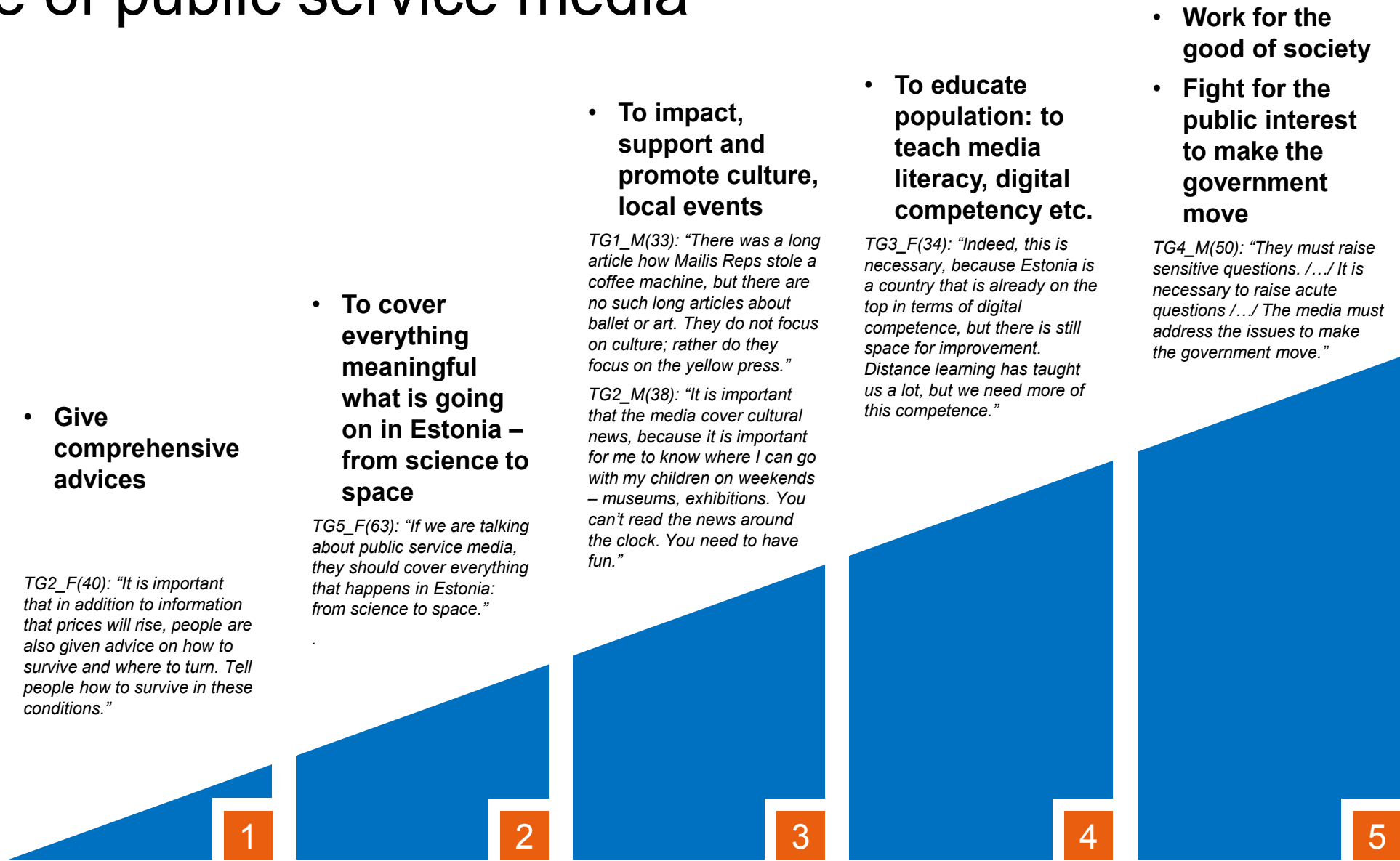
Conducting debates – rather in Estonian than in Russian though

TG1_M(26): "They are good at conducting debates. The culture of debating in Estonia is very good. But ask ERR why political debates that take place in Estonian are not translated into Russian."

Informing people on urgent, critical topics

TG1_F(31): "I think a lot has been done in the past years. For example, during Covid, at the beginning it was generally incomprehensible, then the state began to hold some kind of press conferences, give information, this is already a good trend."

The role of public service media



5 missions of public service media

Assessment of freedom of speech in journalism in Estonia

There is no freedom of press / freedom of speech in Estonia

TG2_M(38): "If in your words there is at least some hint that Russia is right in something, and Ukraine is wrong in something, you will be immediately banned or cancelled. People are just afraid."

TG2_M(51): "Stalnuhhin, for example. He was kicked out of the party even though he just said his opinion. He didn't say anything bad."

There is, to some extent, freedom of press / freedom of speech in Estonia

(in specific topics)

TG3_M(29): "About the increase in the share of green energy, they write about it in the media, and they release an alternative opinion of people. People seem to be allowed to speak out, and not always in a positive way."

Media and people in Estonia are rather free

TG3_M(29): "I would not entirely agree with one red line. Now the election race has partially begun, however, the portals allow themselves to disagree with the actions of our Madam Prime Minister, do not hesitate to criticize her."

TG5_2F(61): "I think we have freedom of speech. And Kaja Kallas is also being criticized from time to time."

Any criticism towards the ruling party, government, deputies is considered as a fact of freedom of speech, while cases when those who speak positively towards Russia being banned, deported, not allowed to the government, also criminal cases are being opened against them (Jana Toom, Juri Kivit, Mihhail Stalnuhhin etc.) are perceived as a breach of rights for freedom of speech

TG2_M(38): "There was a situation with a director from the Russian theater recently, who published his opinion. There was nothing extraordinary, but he was immediately fired. I don't like that. The director of the theater explained this by the fact that if such opinions are voiced, there will be no funding."

TG5_1F(61): "I don't agree, we don't have any freedom of speech. The command is given, and this is how journalists cover it."

TG1_F(33): "People are deported to Russia, although they have nothing to do with Russia, except that they are Russians, they have no one there. Like go to your historical homeland, although what kind of homeland is there if he was born in Estonia."

TG5_2M(61): "In any case, everyone here is given the floor. Politicians, I mean. /.../ Here you can find any point of view. I can come to Tallinn to any demonstration if I'm interested. Any deputy can say something, and his opinion will be published. Even about tanks: there were those who were expelled from Estonia, but they had an opinion and were interviewed."

Assessment of freedom of speech and press

Opinions were divided:

- **there is no freedom of press and speech in Estonia,**
- others were sure there is freedom of press and **speech to some extent, but only in some specific topics.**
- Some also said **media and people in Estonia are rather free to express their thoughts.**

Here it is important to emphasize that **any criticism towards the ruling party, government, deputies is considered as a fact of freedom of speech**, while cases when those who speak positively towards Russia being banned, deported, not allowed to the government, also criminal cases are being opened against them (Jana Toom, Juri Kivit, Mihhail Stalnuhhin etc.) are **perceived as a breach of rights for freedom of speech.**

Media & elections



Following information on the elections

People with active civil position

- **Follow information provided by the media about the elections and the candidates**

TG2_F(47): "It's impossible not to follow, because the information is everywhere. You open the internet, there is a flow. It pours from all sides, you can't hide even if you wanted to."

- **Mostly use public service media to get information about the elections, candidates, programs, promises etc.**

TG1_M(26): "There was an article on the ERR about the slogans of the parties, about the candidates and the areas they work."

- **Also use commercial media outlets, social media, valimised.ee, to receive information about the elections**

- **Track ratings of different political parties**

TG3_M(34): "Social networks are important, if we talk about campaigning. And if we talk about information about the elections, then the media, valimised.ee."

TG5_1M(61): "The best source is posts on Facebook when people openly write about their politics."

- **Watch online broadcasts from the meetings of deputies**

TG3_F(34): "I am interested in elections and as long as I live in Estonia, I will always be interested in this topic. These are social networks, and from what was not mentioned earlier, I will also say that there are online broadcasts from city meetings, which I also follow. This is important for me, and if I don't watch online, then I watch it in recordings."

Public service media is the primary source of information for those who follow news on the elections. Commercial media and social media are the secondary sources.

People with passive civil position

- **Do not follow information about the elections and the candidates, are sure this information is everywhere – why to follow?**

TG3_F(30): "I do not follow, but information about the elections is everywhere - on the street, on Facebook, on the Internet."

- **Are convinced important information will somehow reach them**

TG1_M(33): "You can sit still and information about the elections will find you."

- **Get to know about the elections from the outdoor media (posters, billboards, in-store campaigns etc.)**

TG3_M(30): "There are plenty of billboards in the street."

TG4_M(40): "You learn about elections when you see posters on the streets."

- **Do not follow any sources of information, because do not trust anyone, not interested in politics, have passive civic position, cannot vote etc.**

TG4_M(58): "Which sources of information are you talking about? Everyone lies."

TG4_M(40): "They say one thing to Russian-speakers, they say another to Estonian-speakers. You don't trust anyone anymore."

Thank you!

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